



Self and team assessment using Belbin team roles

Leadership Dimensions

Engaging the team

Leading with care

Dr Meredith Belbin's work over 30 years has identified 9 clusters of behaviour, which he calls 'team roles'. Each team-role has a combination of strengths and allowable weaknesses.

The value of Belbin® team role theory lies in enabling an individual or team to benefit from self-knowledge, which provides the foundation for team building and allows you to adjust to meet demands arising from the change project. Belbin suggests that, by understanding your team role within a particular team, you can develop your strengths and manage your weaknesses as a team member, and so improve how you contribute to the team.

What to do - three-step analysis, from self to team

This tool will enable you to look at your own strengths and weakness, as well as those of the team from the perspective of the nine [9] Belbin team roles.

1. Create your **Self-Perception Inventory**.

Review and select statements that identify your attitudes and behaviours, then compare and weight the selected statements.

2. **Score** your Self-Perception Inventory.

Transfer your weightings to a team roles matrix to determine which role[s] you are likely to fill within the team.

3. **Assess the balance of your team** in terms of Belbin team roles.

Consider the members of your team and try to identify the likely team role that each plays within the team. Refer to the overview below and to the Belbin® Team Roles and Skill Inventory for full descriptions of each team role, including their likely strengths and weaknesses.

An overview of Belbin team roles

Action Oriented Roles

| | |
|---|--------------------------------------|
| Shaper [SH] | Challenges the team to improve. |
| Implementer [IMP] | Puts ideas into action. |
| Completer-Finisher [CF] | Ensures thorough, timely completion. |

People Oriented Roles

| | |
|--|---------------------------------|
| Co-ordinator [CO] | Acts as a chairperson. |
| Team Worker [TW] | Encourages cooperation. |
| Resource Investigator [RI] | Explores outside opportunities. |

Thought Oriented Roles

| | |
|--|------------------------------------|
| Plant [PL] | Presents new ideas and approaches. |
| Monitor-Evaluator [ME] | Analyses the options. |
| Specialist | Provides specialised skills. |

The Belbin® Team Roles and Skill Inventory has full descriptions of each team role, including their likely strengths and weaknesses.

1. Create your Self-Perception Inventory¹

You need to make **two sets of decisions in each section**.

- Read the sentences in each section.
- Identify **up to THREE (3)** sentences that apply to you.
- Weight your sentences by dividing 10 points between the sentences you ticked.
For example, if you **only tick 2 sentences**, divide the 10 points between the 2 sentences.
If you tick **3 sentences**, divide the 10 points between the 3 sentences.
If you **only tick 1 sentence**, the weighting must be 10.

Section A - When involved in a project with other people...

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I can be relied upon to see that work that needs to be done is organised. | | |
| | 2 | I pick up slips and omissions that others fail to notice. | | |
| | 3 | I react strongly when meetings look like losing track of the main objective. | | |
| | 4 | I produce original suggestions. | | |
| | 5 | I analyse other people's ideas objectively, for both merits and failings. | | |
| | 6 | I am keen to find out the latest ideas and developments. | | |
| | 7 | I have an aptitude for organising people. | | |
| | 8 | I am always ready to support good suggestions that help to resolve a problem. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

Section B - In seeking satisfaction through my work...

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I like to have a strong influence on decisions. | | |
| | 2 | I feel in my element where work requires a high degree of attention and concentration. | | |
| | 3 | I am concerned to help colleagues with their problems. | | |
| | 4 | I like to make critical discrimination between alternatives. | | |
| | 5 | I tend to have a creative approach to problem solving. | | |
| | 6 | I enjoy reconciling different points of view. | | |
| | 7 | I am more interested in practicalities than new ideas. | | |
| | 8 | I particularly enjoy exploring different views and techniques. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

¹ This version of the Belbin test has been taken from Belbin Test from Teambuilding by Alistair Fraser and Suzanne Neville (1993). The Industrial Society. London.

Section C - When the team is trying to solve a particularly complex problem

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I keep a watching eye on areas where difficulty may arise. | | |
| | 2 | I explore ideas that may have a wider application than in the immediate task. | | |
| | 3 | I like to weigh up and evaluate a range of suggestions thoroughly before choosing. | | |
| | 4 | I can co-ordinate and use productively other people's abilities and talents. | | |
| | 5 | I maintain a steady systematic approach, whatever the pressures. | | |
| | 6 | I often produce a new approach to a long continuing problem. | | |
| | 7 | I am ready to make my personal views known in a forceful way if necessary. | | |
| | 8 | I am ready to help whenever I can. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

Section D - In carrying out my day-to-day work...

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I am keen to see there is nothing vague about my task and objectives. | | |
| | 2 | I am not reluctant to emphasise my own point of view in meetings. | | |
| | 3 | I can work with all sorts of people provided they have something worthwhile to contribute. | | |
| | 4 | I make a point of following up interesting ideas and/or people. | | |
| | 5 | I can usually find the argument to refute unsound propositions. | | |
| | 6 | I tend to see patterns where others would see items as unconnected. | | |
| | 7 | Being busy gives me real satisfaction. | | |
| | 8 | I have a quiet interest in getting to know people better. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

Section E - If I am suddenly given a difficult task with limited time and unfamiliar people...

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I often find my imagination frustrated by working in a group. | | |
| | 2 | I find my personal skill particularly appropriate in achieving agreement. | | |
| | 3 | My feelings seldom interfere with my judgement. | | |
| | 4 | I strive to build up an effective structure. | | |
| | 5 | I can work with people who vary widely in their personal qualities and outlook. | | |
| | 6 | I feel it is sometimes worth incurring some temporary unpopularity if it means succeeding in getting your views across in a group. | | |
| | 7 | I usually know someone whose specialist knowledge is particularly apt. | | |
| | 8 | I seem to develop a natural sense of urgency. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

Section F - When suddenly asked to consider a new project...

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I start to look around for possible ideas and openings. | | |
| | 2 | I am concerned to finish and perfect current work before I start. | | |
| | 3 | I approach the problem in a carefully analytical way. | | |
| | 4 | I am able to assert myself to get other people involved if necessary. | | |
| | 5 | I am able to take an independent and innovative look at most situations. | | |
| | 6 | I am happy to take the lead when action is required. | | |
| | 7 | I can respond positively to my colleagues and their initiatives. | | |
| | 8 | I find it hard to give in a job where the goals are not clearly defined. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

Section G - In contributing to group projects, in general...

| ✓ | ← | TICK up to 3 sentences that you believe could APPLY to you. Weight the ticked sentences by dividing 10 points between the sentences you ticked. | → | Points 1-10 |
|---|---|--|---|----------------|
| | 1 | I think I have a talent for sorting out the concrete steps that need to be taken given a broad brief. | | |
| | 2 | My considered judgement may take time but is usually near the mark. | | |
| | 3 | A broad range of personal contacts is important to my style of working. | | |
| | 4 | I have an eye for getting the details right. | | |
| | 5 | I try to make my mark in group meetings. | | |
| | 6 | I can see how ideas and techniques can be used in new relationships. | | |
| | 7 | I see both sides of a problem and take a decision acceptable to all. | | |
| | 8 | I get on well with others and work hard for the team. | | |
| You MUST allocate all points to a combined total of | | | | 10 |

2. Score your Self-Perception Inventory

[Please note that this exercise does not use the team role, 'specialist'.]

The following matrix provides

- a row for each of the seven [7] sections in the inventory, A-G
- numbered spaces for writing the weightings you gave to the sentences you ticked in each section

Transfer your weightings for the selected statements in each section of your Self-Perception Inventory to the numbered spaces in each row, A-G, of the matrix below.

Then total your scores for each column and identify your primary and secondary team roles.

Example

If your Section A allocations were **7** for statement 2 and **3** for statement 4, you would write

| | | | | | | | | |
|---|--------|--------|------------|--------|--------|--------|--------|------------|
| A | 3 ____ | 7 ____ | 4 3 | 6 ____ | 5 ____ | 1 ____ | 8 ____ | 2 7 |
|---|--------|--------|------------|--------|--------|--------|--------|------------|

1. Transfer your weightings for the statements you ticked in each section to the numbered spaces in rows A-G. Of course, you will only have a maximum of THREE (3) weightings to write per row.

| | | | | | | | | |
|---|--------|--------|--------|--------|--------|--------|--------|--------|
| A | 3 ____ | 7 ____ | 4 ____ | 6 ____ | 5 ____ | 1 ____ | 8 ____ | 2 ____ |
| B | 1 ____ | 6 ____ | 5 ____ | 8 ____ | 4 ____ | 7 ____ | 3 ____ | 2 ____ |
| C | 7 ____ | 4 ____ | 6 ____ | 2 ____ | 3 ____ | 5 ____ | 8 ____ | 1 ____ |
| D | 2 ____ | 3 ____ | 6 ____ | 4 ____ | 5 ____ | 1 ____ | 8 ____ | 7 ____ |
| E | 6 ____ | 5 ____ | 1 ____ | 7 ____ | 3 ____ | 4 ____ | 2 ____ | 8 ____ |
| F | 6 ____ | 4 ____ | 5 ____ | 1 ____ | 3 ____ | 8 ____ | 7 ____ | 2 ____ |
| G | 5 ____ | 7 ____ | 6 ____ | 3 ____ | 2 ____ | 1 ____ | 8 ____ | 4 ____ |

2. Total the points for each column

| | | | | | | | | |
|-------|------|------|------|------|------|------|------|------|
| Total | ____ | ____ | ____ | ____ | ____ | ____ | ____ | ____ |
|-------|------|------|------|------|------|------|------|------|

3. The HIGHEST two totals represent your PRIMARY and SECONDARY preferred team roles.

| | | | | | | | |
|--------------|--------------------|-------------|--------------------------------|-----------------------------|--------------------|-------------------|------------------------------|
| SH Shaper | CO Co-ordinator | PL Plant | RI Resource Investigator | ME Monitor- Evaluator | IMP Implementer | TW Team Worker | CF Completer- Finisher |
|--------------|--------------------|-------------|--------------------------------|-----------------------------|--------------------|-------------------|------------------------------|

Refer to the [Belbin® Team Roles and Skill Inventory](#) for full descriptions of each team role, including their likely strengths and weaknesses.

3. Assess the balance of your team in terms of Belbin team roles

Team leaders and team development practitioners often use the Belbin model to help create more balanced teams.

- If team members have similar weakness, the team as a whole may tend to have that weakness.
- If team members have similar team-work strengths, they may tend to compete - rather than co-operate - for the team tasks and responsibilities that best suit their natural styles.

You can use the Belbin model with your team to help ensure that necessary team roles are covered, and that potential behavioural tensions or weaknesses among the team members are addressed.

What to do

You have established your Belbin profile. Now consider your team mates.

1. Place their names down the left hand column.
2. Tick what you think each team mate's primary team role may be.
3. Compare your estimates with the profiles that each team mate shares with the group.

Legend

SH - Shaper

CO - Co-ordinator

PL - Plant

RI - Resource investigator

ME - Monitor evaluator

IMP - Implementer

TW - Team worker

CF - Completer finisher

| Team members | SH Shaper | CO Co-ordinator | PL Plant | RI Resource investigator | ME Monitor evaluator | IMP Implementer | TW Team worker | CF Completer Finisher |
|--------------|--------------|--------------------|-------------|--------------------------------|----------------------------|--------------------|-------------------|-----------------------------|
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Belbin® Team Roles and Skill Inventory

Action-oriented roles

Shaper (SH)

Shapers are people who challenge the team to improve. They are dynamic and usually extroverted people who enjoy stimulating others, questioning norms, and finding the best approaches to problems. The Shaper is the one who shakes things up to make sure that all possibilities are considered and that the team does not become complacent.

Shapers often see obstacles as exciting challenges and they tend to have the courage to push on when others feel like quitting. Their potential weaknesses may be that they're argumentative, and that they may offend people's feelings

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|--|--|--|
| <ul style="list-style-type: none"> Drives other people to excel Challenging, dynamic, thrives on pressure Has the drive and courage to overcome obstacles | <ul style="list-style-type: none"> Can be provocative Sometimes hurts people's feelings Prone to frustration and irritation | <ul style="list-style-type: none"> Consistently tramples on people's feelings Inability to recover situation with good humour or apology |

Implementer (IMP)

Implementers are well organized. They are the people who get things done. They turn the team's ideas and concepts into practical actions and plans. They are typically conservative, disciplined people who work systematically and efficiently. These are the people who you can count on to get the job done. On a wider front they hold unswerving loyalty to the organisation and are less concerned with the pursuit of self-interest.

On the downside, Implementers may be inflexible and somewhat resistant to change.

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|---|---|---|
| <ul style="list-style-type: none"> Disciplined, reliable, conservative in habits. A capacity for taking practical steps and actions. Organising ability. | <ul style="list-style-type: none"> Somewhat inflexible. Slow to respond to new possibilities. | <ul style="list-style-type: none"> Inflexible, resistance to unproven ideas. |

Completer-Finisher (CF)

Completer-Finishers are the people who see that projects are completed thoroughly. They ensure there have been no errors or omissions and they pay attention to the smallest of details. They are very concerned with deadlines and will push the team to make sure the job is completed on time. They are described as perfectionists who are orderly, conscientious, and anxious.

However, a Completer-Finisher may worry unnecessarily and find it hard to delegate

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|---|--|--|
| <ul style="list-style-type: none"> Painstaking, conscientious, anxious. Searches out errors and omissions. Delivers on time | <ul style="list-style-type: none"> Inclined to worry unduly. Reluctant to let others into own job. | <ul style="list-style-type: none"> Overstressed due to failure to delegate. A tendency to worry about small things and a reluctance to "let go". |

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People-oriented roles

Co-ordinator (CO)

Coordinators are the ones who take on the traditional team-leader role and have also been referred to as the chairmen. They guide the team to what they perceive are the objectives. They are often excellent listeners and they are naturally able to recognise the value that each team members brings to the table. They are calm and good-natured and delegate tasks very effectively.

Their potential weaknesses are that they may delegate away too much personal responsibility, and may tend to be manipulative

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|--|--|--|
| <ul style="list-style-type: none"> The team controller Mature, confident, trusting Good chairperson – Recognises skills Clarifies goals, promotes decision making, delegates well | <ul style="list-style-type: none"> Can be seen as manipulative Delegates personal work Inclination to be lazy if someone else can be found to do the work | <ul style="list-style-type: none"> Takes personal credit for the effort of the team |

Resource Investigator (RI)

Resource Investigators are innovative and curious. They explore available options, develop contacts, and negotiate for resources on behalf of the team. They are enthusiastic team members, who identify and work with external stakeholders to help the team accomplish its objective. They are outgoing and are often extroverted, meaning that others are often receptive to them and their ideas.

On the downside, they may lose enthusiasm quickly, and are often overly optimistic.

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|--|---|--|
| <ul style="list-style-type: none"> Creative negotiator Extrovert, enthusiastic, communicative Explores new opportunities Develops outside contacts and brings home new ideas | <ul style="list-style-type: none"> Over optimistic Loses interest once initial Enthusiasm has passed | <ul style="list-style-type: none"> Letting down colleagues/ Clients by neglecting to make follow-up arrangements. Liable to lose interest once the initial fascination has passed. |

Team Worker (TW)

Team Workers are the people who provide support and make sure the team is working together. These people fill the role of negotiators within the team and they are flexible, diplomatic, and perceptive. These tend to be popular people who are very capable in their own right but who prioritise team cohesion and helping people getting along.

Their weaknesses may be a tendency to be indecisive, and maintain uncommitted positions during discussions and decision-making.

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|--|---|---|
| <ul style="list-style-type: none"> Focuses on harmony Co-operative, mild, diplomatic Listens, build understanding. Defuses conflict. | <ul style="list-style-type: none"> Indecision at moments of crisis and some failure to provide a clear lead to others. | <ul style="list-style-type: none"> Failure to work with others collaboratively. Fails to act when required. |

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Thought-oriented roles

Plant (PL)

The Plant is the creative innovator who comes up with new ideas and approaches. They thrive on praise but criticism is especially hard for them to deal with.

Plants are often introverted and prefer to work apart from the team. Because their ideas are so novel, they can be impractical at times. They may also be poor communicators and can tend to ignore given parameters and constraints.

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|--|--|---|
| <ul style="list-style-type: none"> Source of original ideas Creative, imaginative, unorthodox Solves difficult problems | <ul style="list-style-type: none"> Ignore details Too preoccupied to Communicate effectively Neglects practical matters | <ul style="list-style-type: none"> Strong ownership of idea when co-operation with others would yield better results Looks down on others |

Monitor Evaluator (ME)

Monitor-Evaluators are best at analysing and evaluating ideas that other people (often Plants) come up with. These people are shrewd and objective and they carefully weigh the pros and cons of all the options before coming to a decision.

Monitor-Evaluators are critical thinkers and very strategic in their approach. They are often perceived as detached or unemotional. Sometimes they are poor motivators who react to events rather than instigating them.

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|---|---|---|
| <ul style="list-style-type: none"> The analyser of problems Sober, cool, strategic, discerning Sees all options Judges accurately | <ul style="list-style-type: none"> Sometimes lacking in tact- 'these are facts' Inability to inspire others Judgmental, too critical | <ul style="list-style-type: none"> Lack of inspiration. Constant harsh criticism, people's feelings |

Specialist (SP)

Specialists are people who have specialised knowledge that is needed to get the job done. They pride themselves on their skills and abilities, and they work to maintain their professional status.

Their job within the team is to be an expert in the area, and they commit themselves fully to their field of expertise. This may limit their contribution, and lead to a preoccupation with technicalities at the expense of the bigger picture.

| Strengths | Allowable weaknesses | Non allowable weaknesses |
|---|---|--|
| <ul style="list-style-type: none"> Single-minded, self-starting, dedicated. Provides knowledge and skills in rare supply. | <ul style="list-style-type: none"> Contributes on only a limited front. Dwells on specialised personal interests. | <ul style="list-style-type: none"> Will not contribute on a very narrow front. Will only commit if self interest is satisfied. |